

POSITION DUTY STATEMENT

PM-0924 (REV 01/2022)

CLASSIFICATION TITLE Sr Transportation Planner	OFFICE/BRANCH/SECTION Rail / Office of Assets & Equipment	
WORKING TITLE Chief, Fleet Management Program Branch	POSITION NUMBER 900-075-4724-920	REVISION DATE 11/20/2024

As a valued member of the Caltrans leadership team, you make it possible for the Department to provide a safe and reliable transportation network that serves all people and respects the environment.

GENERAL STATEMENT:

Under the general direction of the Chief, Office of Assets & Equipment (OAE) in the Division of Rail (DOR), the Senior Transportation Planner as Chief, Fleet Management Branch, serves as the DOR fleet planning and project management support subject-matter expert for California passenger rail fleet planning and deployment as well as development, execution and management of associated contracts and agreements. The Senior Transportation Planner leads fleet planning and deployment efforts and serves as task order manager for a Rail Professional consultant contract, Fleet Planning related tasks. In this role, the Senior Transportation Planner ensures Caltrans-owned equipment and assets are maintained and utilized efficiently, and ensures that new locomotive and rail car assets are integrated into the existing fleet effectively and efficiently. The Senior Transportation Planner provides support to the Rolling Stock Procurement and Equipment Inspection Branches on activities related to repair, overhaul, modification, and modernization of existing rail rolling stock, and coordinates with RPI to ensure that fleet planning is tied to state rail network goals in the California State Rail Plan and to provide technical assistance for capital project development duties.

CORE COMPETENCIES:

As a Sr Transportation Planner, the incumbent is expected to become proficient in the following competencies as described below in order to successfully perform the essential functions of the job, while adhering to and promoting the Department's Mission, Vision, Values, Strategic Imperatives and Goals. Effective development of the identified Core Competencies fosters the advancement of the following Leadership Competencies: Change Commitment, Risk Appetite, Self-Development/Growth, Conflict Management, Relationship Building, Organizational Awareness, Communication, Strategic Perspective, and Results Driven.

- **Managing Change:** Demonstrating support for organizational changes needed to improve the department's effectiveness; supporting, initiating, sponsoring and implementing change. (Cultivate Excellence, Enhance and Connect the Multimodal Transportation Network, Strengthen Stewardship and Drive Efficiency - Engagement, Innovation)
- **Decision Making:** Makes critical and timely decisions. Takes charge. Supports appropriate risk. Makes challenging and appropriate decisions. (Cultivate Excellence, Enhance and Connect the Multimodal Transportation Network, Strengthen Stewardship and Drive Efficiency - Engagement, Equity, Pride)
- **Continuous Professional Development:** Seeks to obtain knowledge and improve performance while supporting others in doing the same. (Cultivate Excellence, Strengthen Stewardship and Drive Efficiency - Engagement, Innovation)
- **Problem-solving and Decision-making :** Identifies problems and uses logical analysis to find information, understand causes, and evaluate and select or recommend best possible courses of action. (Enhance and Connect the Multimodal Transportation Network, Strengthen Stewardship and Drive Efficiency, Advance Equity and Livability in all Communities - Engagement, Equity, Innovation)
- **Relationship Building:** The ability to develop and maintain internal and external trust and professional relationships, which includes listening and understanding to build rapport. (Cultivate Excellence, Enhance and Connect the Multimodal Transportation Network, Strengthen Stewardship and Drive Efficiency - Engagement, Equity)
- **Organizational Awareness:** Contributes to the organization by understanding and aligning actions with the organization's strategic plan, including the mission, vision, goals, core functions, and values. (Cultivate Excellence, Enhance and Connect the Multimodal Transportation Network, Strengthen Stewardship and Drive Efficiency - Engagement)
- **Interpersonal Effectiveness :** Effectively and appropriately interacts and communicates with others to build positive, constructive, professional relationships. Tailors communication style based on the audience. Provides and is receptive to feedback. (Cultivate Excellence, Strengthen Stewardship and Drive Efficiency - Engagement, Equity)
- **Vision and Strategic Thinking:** Communicates the "big picture". Models the department's Vision and Mission to others. Influences others to translate vision into action. Future oriented, and creates competitive and break through strategies and plans. (Cultivate Excellence, Enhance and Connect the Multimodal Transportation Network, Strengthen Stewardship and Drive Efficiency, Lead Climate Action - Engagement, Integrity)
- **Technical Expertise:** Depth of knowledge and skill in a technical area. (Enhance and Connect the Multimodal Transportation Network, Strengthen Stewardship and Drive Efficiency - Engagement, Innovation, Pride)

ADA Notice

For individuals with sensory disabilities, this document is available in alternate formats. For alternate format information, contact the Forms Management Unit at (279) 234-2284, TTY 711, or write to Records and Forms Management, 1120 N Street, MS-89, Sacramento, CA 95814.

POSITION DUTY STATEMENT

PM-0924 (REV 01/2022)

TYPICAL DUTIES:

Percentage		Job Description
40%	E	Report to and provide assistance to the OAE Chief in planning, development and administration of California's long-term rail rolling stock Fleet Management Plan, including projecting future equipment needs, planning rolling stock deployment, ridership modeling, and planning coordination with the Caltrans' long-range rail planning documents. Plans may include funding, rolling stock fleet deployment, acquisition of new or replacement rolling stock, JPA equipment transfer agreements, facility management and development, capital project development and administration. Coordinate with Office of Rail Planning and Implementation to match current fleet deployments and future procurements to service levels identified by the California State Transportation Agency (CalSTA) and forecast in the State Rail Plan. Coordinate also with the Office of Passenger Rail Operations and Maintenance (PROM) on equipment needs related to JPA operation, maintenance, and budgetary functions.
25%	E	Plan, direct, and monitor the work of transportation planner staff responsible for developing long-term plans for fleet management and maintenance, including the Fleet Management Plan. Coordinate transportation planner staff work to align fleet plans with the State Rail Plan, including meeting with the Office of Rail Planning and Implementation, tracking railcar fleet information and issues across multiple information sources. Identify emerging trends in vehicle design, maintenance, and administration, and assess applicability to the California passenger rail environment, including intercity and commuter routes. Lead Key Performance Indicator(KPI)Performance Dialogue calls and Overhaul Working Group.
20%	E	Oversee and delegate staff to work with subject-matter expert consultants and contractors to review existing maintenance techniques and practices to validate their effectiveness. Work with the maintenance contractors, car builders, and other vendors to review potential maintenance programs, lower cost, and maintain the highest possible levels of safety. Make recommendations and prepare commercial justifications for such investments and or implementations for executive management of the Rail Program and Caltrans. Determine impact on other contract requirements and Federal regulations prior to implementing any new technology or maintenance practice to ensure compliance.
10%	E	Manage and oversee fleet planning and deployment as well as asset management related tasks via Rail professional consultant contract(s), including development and approval of scope of work for fleet planning and deployment task orders, task and fund management, approval of related invoices, review of submittal and deliverables, acceptance and management of consultant staff and other related activities as required. Delegate transportation planner staff to assist with these plans as required. With staff, monitor equipment leases of Amtrak-owned rolling stock, including representing the state at the State-Amtrak Intercity Passenger Rail Committee's Equipment Working Group and reviewing Amtrak billing and usage reports for accuracy.
5%	M	Provide support to the OAE Chief as needed for the development of reports, budget change proposals, California Transportation Commission (CTC) information packages, presentations to internal and external organizations as to the status of all assets and facility-related activities and projects. Perform other job-related duties within the scope of the classification as assigned.

¹ESSENTIAL FUNCTIONS are the core duties of the position that cannot be reassigned.

MARGINAL FUNCTIONS are the minor tasks of the position that can be assigned to others.

SUPERVISION OR GUIDANCE EXERCISED OVER OTHERS

This position will supervise Transportation Planners and Associate Transportation Planners. The Sr. TP will also act as a lead on special projects and may review or oversee tasks performed by staff outside of the Fleet Management Program Branch.

KNOWLEDGE, ABILITIES, AND ANALYTICAL REQUIREMENTS

- Knowledge of the principles and practices associated with the planning and development of passenger rail services and strong project management, procurement experience, and contract expertise.
- The ability to effectively communicate the principles and practices of procurement and service contract administration in order to provide effective support and assistance to staff and executives in management of a wide variety of rail equipment, operations and planning related contracts and agreements.
- Knowledge and understanding of rail transportation planning and programs and more generally federal and state multi-modal planning requirements and practices; transportation; air quality; land use; and environmental planning principles and practices; transportation plan, program, and project financing mechanisms; and contemporary transportation land use, social, economic, environmental, financial, technical, legal, and political issues - especially in regard to rail.

ADA Notice

For individuals with sensory disabilities, this document is available in alternate formats. For alternate format information, contact the Forms Management Unit at (279) 234-2284, TTY 711, or write to Records and Forms Management, 1120 N Street, MS-89, Sacramento, CA 95814.

POSITION DUTY STATEMENT

PM-0924 (REV 01/2022)

-
- The ability to work cooperatively and speak knowledgeably with representatives of other Caltrans divisions, other State and Federal governmental agencies, Amtrak, rail equipment manufacturers, freight railroads, legislative staff, FRA, and individual citizens.
 - The ability to speak effectively before groups and present a good image of the Division and Department in any situation.
-

RESPONSIBILITY FOR DECISIONS AND CONSEQUENCES OF ERROR

The incumbent is responsible for ensuring that rules, guidelines and policies relating to contracts, capital programs and projects are known by managers and staff, and are complied with. They must ensure that the rail projects are implemented in compliance with such policies.

Decisions must be consistent with Departmental policy and the authority vested in the position. Failure to ensure compliance with policies, granted authority and Department plans and processes could result in State funds being expended without the accrual of the required benefits to the State. Contracts that are not developed and managed properly could result in additional unknown costs to the State through claims and legal actions, project delays, loss of funding and equipment failures. Failure to keep projects moving through the project development and delivery process could result in unacceptable gaps in passenger rail services, inhibit the Department from securing project funding, and subject the Department to criticism and unflattering comments.

PUBLIC AND INTERNAL CONTACTS

The incumbent has frequent contacts with other in the Department, other state agencies, other state DOTs, Federal agencies, cities, counties, consultants, railroads, equipment manufacturers and the general public.

PHYSICAL, MENTAL, AND EMOTIONAL REQUIREMENTS

The incumbent develops and maintains cooperative working relationships. Ensures employees are treated in a fair and equitable manner. Must have the ability to multi-task, adapt to changes in priorities and complete tasks or projects with short notice. Develop new insights into situations and apply innovative solutions to make organizational improvements. Formulate effective strategies consistent with the Department's vision and goals. Create and sustain an organization culture that encourages others to provide the quality of service essential to high performance.

WORK ENVIRONMENT

This position may be eligible for telework. The amount of telework is at the discretion of the Department and based on Caltrans's evolving telework policy. Caltrans supports telework, recognizing that in-person attendance may be required based on operational needs. Employees are expected to be able to report to their worksites with minimum notification if an urgent need arises. The selected candidate will be required to commute to the headquartered location as needed to meet operational needs. Business travel may be required, and reimbursement considers an employee's designated headquartered location, primary residence, and may be subject to CalHR regulations or applicable bargaining unit contract provisions. All commute expenses to the headquartered location will be the responsibility of the selected candidate.

Employees may be required to travel. May need to extend day to complete vital projects.

POSITION DUTY STATEMENT

PM-0924 (REV 01/2022)

I have read, understand and can perform the duties listed above. (If you believe you may require reasonable accommodation, please discuss this with your hiring supervisor. If you are unsure whether you require reasonable accommodation, inform the hiring supervisor who will discuss your concerns with the Reasonable Accommodation Coordinator.)

EMPLOYEE (Print)

EMPLOYEE (Signature)

DATE

I have discussed the duties with, and provided a copy of this duty statement to the employee named above.

SUPERVISOR (Print)

SUPERVISOR (Signature)

DATE

ADA Notice

For individuals with sensory disabilities, this document is available in alternate formats. For alternate format information, contact the Forms Management Unit at (279) 234-2284, TTY 711, or write to Records and Forms Management, 1120 N Street, MS-89, Sacramento, CA 95814.